

TAFELMUSIK



Gift of Marketable Securities Confirmation Form

Please see page two of this form for four easy steps to give a gift of securities.

To make a donation of securities, please fill out this form and return it to Tafelmusik in one of the following ways:

By Fax: 416.964.2782 attn: Katie Norman

By email: knorman@tafelmusik.org

By mail: see instructions on page 2

Full Name of Donor: _____

Address: _____

City: _____ Province: _____ Postal Code: _____

Daytime Phone: _____ Evening Phone: _____

Name of Broker: _____

Name of Firm: _____

Phone: _____ Fax: _____

Date of Transfer: _____

Name of Security: _____

Where Traded: _____ Securities Number: _____

Description of Shares (i.e. common, preferred): _____

Quantity of Shares: _____ Approximate Unit Value: _____

Designation of Gift for Tafelmusik:

Tafelmusik to designate donation based on need

OR

Specific Fund: Annual/Membership Artist Training Endowment

Other: _____

Signature of Donor: _____ Date: _____

By this signature I hereby instruct my broker to effect the transfer proposed above upon confirmation by Tafelmusik.



Thank you for your gift! To ensure a smooth transaction:

1. Please complete (or have your broker complete) all sections of this form. Contact Katie Norman at 416.964.9562 ext. 240 or knorman@tafelmusik.org to inform her that you are making a Gift of Securities.

2. Return a copy of this completed form to Tafelmusik Baroque Orchestra and Chamber Choir, to ensure you receive your official receipt for income tax purposes. Forms can be faxed to 416.964.2782 or sent by mail to:

Katie Norman, Associate Development Director
Tafelmusik Baroque Orchestra and Chamber Choir
427 Bloor Street West, Box 14
Toronto, Ontario M5S 1X7

3. The marketable securities/shares will need to be transferred to Tafelmusik's financial advisor. Please advise your broker to contact our financial advisor, as listed below, to enact the transaction:

Account #: 411-21979-10
Account name: Tafelmusik
FINS #: T002
CUID: DOMA
Rep code: J66 – Gary Ursell
RBC Dominion Securities Inc.

Administrative Assistant, Angeline Calimlim, Gary Ursell Investment Advisory Team:

Email: angeline.calimlim@rbc.com

Tel: 416-842-3143

Fax: 416-842-3542

4. A charitable tax receipt will be issued based on the end-of-day trading price on the day the securities are received by our financial advisor. (Note: Shares are considered legally transferred only when delivery is confirmed by our custodial agent.)

Thank you for your generous support!